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ABSTRACT

During the last two years many legislatures and state boards of education have been devising plans and establishing programs to reward outstanding performance of teachers through incentive programs. States are implementing large-scale statewide programs, funding pilot projects, or funding the local development of performance-based incentive programs. A survey in August 1984 showed several different approaches states used to develop these programs. While the states' responses varied, the questions to be resolved are similar: Will statewide or locally developed plans be adopted? Who will be included--teachers and/or administrators? How will teachers be evaluated? What about funding? Will teachers receive incentives in the first year of the program, or will the pay incentives and, therefore, major state funding be phased in after two or three years? This publication includes an updated version of the 50-state survey and provides an analysis of the emerging trends in developing and refining plans, implementing programs, and some early observations about intended and unintended outcomes of performance-based incentive programs. A state-by-state summary of 1985 state actions on career ladders is given. (JD)

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CAREER LADDER CLEARINGHOUSE

July 1985

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CAREER LADDER PLANS: TRENDS AND EMERGING ISSUES—1985

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In the spring of 1983, no state was paying teachers and school administrators on the basis of performance. During the last two years, however, more and more legislatures and state boards of education across the country have been devising plans and establishing programs to reward outstanding performance through incentive payments. States are implementing large-scale statewide programs, funding pilot projects, or funding the local development of performance-based incentive programs. These states include: Arizona, California, Colorado, Florida, Idaho, Maine, Maryland, New Jersey, North Carolina, South Carolina, Tennessee, Texas, Utah, Virginia, and Wisconsin. In addition, several states (Delaware, Kentucky, Mississippi, New Mexico, South Dakota, and West Virginia) have established mechanisms for the development of programs. During the 1985 legislative sessions, Alabama, Georgia, and Missouri passed legislation to develop statewide career ladder programs; Arkansas and Indiana provided funding for local pilots; legislation is pending in Louisiana, Massachusetts, and Oklahoma. Numerous other states are actively considering the idea of performance-based incentives for teachers and/or school administrators.

An SREB survey in August of 1984 showed several different approaches among states as they developed and implemented performance-based incentive programs. While the states' responses vary, the questions to be resolved are similar. Will statewide or locally developed plans be adopted? Who will be included—teachers and/or administrators? How will teachers be evaluated? What about funding? Will teachers receive incentives in the first year of the program, or will the pay incentives and, therefore, major state funding be phased in after two or three years? This publication includes an updated version of the 50-state survey and provides an analysis of the emerging trends in developing and refining plans, implementing programs, and some early observations about intended and unintended outcomes of performance-based incentive programs.

This report was prepared by Lynn Cornett and Karen Weeks.

Lynn Cornett, SREB Research Associate, and Karen Weeks, Research Associate at the Vanderbilt Institute for Public Policy Studies, have been responsible for the Southern Regional Education Board's Career Ladder Clearinghouse activities during its first year. Karen Weeks, through a grant from the State of Tennessee, has been actively involved in the analysis of issues so that state legislatures and boards of education would have pertinent information prior to and during the 1985 legislative sessions, when many career ladder discussions were pending. Effective July 1, 1985, Karen Weeks will be a Research Associate at the Tennessee State Board of Education; Lynn Cornett will direct the SREB Clearinghouse activities in 1985-86.

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Developing and Refining Incentive Plans

State leaders have said all along that developing performanced-based compensation plans for teachers and administrators is a complex task. Now that they are into the task, they say it with even more conviction. Four of the issues that legislators and others have considered in designing plans are: who controls the programs; teacher and administrator eligibility and involvement in planning; time frames for developing and implementing plans; and trends in evaluating candidates.

Locally Implemented Versus State Implemented Plans

Control of the state-funded programs can be described as a continuum. At one end are programs designed and administered by states; at the other are programs structured by local districts within state guidelines.

Two of the first statewide plans to be funded and implemented were the Tennessee Career Ladder Plan and the Florida Master Teacher Plan. In both plans decisions about teacher eligibility for incentives are made at the state level. The Texas and North Carolina plans which followed had a high degree of specificity in the legislation that directed the use of a state evaluation instrument, but with local implementation. In Texas, during the initial year of implementation, local evaluation procedures were used to choose teachers for career ladder advancement. However, the state is developing an instrument to be used statewide.

Some states have allowed local districts considerable autonomy. Utah funded a plan that issued limited guidelines from the state level for districts developing plans. Guidelines have become more specific in the second year (and state funding has doubled). Idaho provided its districts with assistance in planning but not funds for incentives. The California Mentor Teacher Program allows districts to develop programs locally, including how teachers are to be chosen and how they will be utilized as mentors in the district.

The trend across the country indicates that most states have developed plans with considerable local autonomy, and the more recently developed plans lean toward a less centralized notion of performance-based incentive plans for teachers.

Teacher and Administrator Eligibility and Involvement

Career ladder plans have been and continue to be developed with a focus on teachers. Three new plans legislated for development or piloting this year (Arkansas, Missouri, and Alabama) are to include only teachers. The definition of who qualifies as a "teacher" is being broadened. Alabama includes all certified personnel except principals and vice-principals. Included are librarians, counselors, vocational education coordinators, and psychometrists. Florida has developed additional evaluation processes for student service and media personnel. Tennessee is developing evaluation systems for special and vocational educators and other instructional personnel who are included in the Teacher Career Ladder Plan.

Tennessee's Career Ladder for Administrators is the first statewide plan that enables principals, vice-principals, and instructional supervisors to be part of a career ladder. North Carolina, South Carolina, and Georgia have legislated that plans be developed for administrators. Several other states are considering their inclusion.

All of the career ladder plans provide for the involvement of teachers in the planning process, either through general provisions or in very specific terms. For example, in Alabama, the legislation passed this year provides for a formal arrangement with the Alabama Education Association. The Association will appoint members to a commission to develop teacher evaluation procedures and the organization will have a formal role in the due process procedures.

Teachers in many states have sought, with varying results, to make approval and development of career ladder plans subject to collective bargaining. The California Mentor Teacher Program, the New Jersey Master Teacher Program, and the Florida School Incentives

Project call for the plans to be a part of the locally negotiated contract. According to the Arkansas legislation to establish pilot programs, at least 30 percent of a district's teachers must approve before the district submits a proposal for state funding. In Wisconsin, teachers had to approve before a district could apply for participation in a state pilot program.

Time Frames for Development and Implementation

As states have moved to develop and implement career ladder plans this year, timing has become an issue. How much time is needed to develop consensus as well as workable programs? Fearing that momentum would be lost, some states enacted programs quickly. On the other hand, because of fiscal realities, some states opt to "try out the programs," or to take a cautious approach because of opposition to the project. Several states are working under delayed time frames or are starting with pilot programs.

South Carolina is proceeding with a pilot project in which local districts will devise programs according to three general models—a performance bonus model in which individual teachers receive payments for meeting objectives based on student achievement and other variables, such as attendance; a career ladder model; and a school-based model in which all teachers in schools that exceed expected standards receive a bonus. One statewide plan is to be chosen and implemented in 1986-87. Wisconsin has been in the process of developing local incentive programs through a U.S. Department of Education grant, although the state has not provided funds for implementation. Virginia funded several pilot programs that began in 1984 and will continue through 1986. Maine has provided state funding for pilot programs designed within districts.

This year, the Arkansas legislature appropriated $500,000 for a small pilot project in six districts. A Kentucky panel devising a career ladder model to be submitted to the legislature in 1985 has called for a pilot project during 1986-87, with recommendations for a state program to be submitted to the 1988 biennial legislative session. In 1984, North Carolina legislation called for a one-year pilot of a career ladder plan in 1985-86; it now appears that a four-year pilot period will be used.

Other long-term approaches are being tried. West Virginia adopted a long-term view in 1984 by calling for evaluation procedures to be established for all school personnel, with incentive models to be built at a later date based on the evaluation procedures that are established. The 1985 Alabama legislation called for a phase-in of a career ladder program over a period of five years; the full implementation cannot take place until legislative approval in 1987. Georgia legislation called for a plan to be devised by June of 1986, but did not specify a date for full implementation. Missouri's legislation provides for phasing in its program. The Charlotte-Mecklenburg, North Carolina, plan—which was developed over a three-year period and implemented during the 1984-85 school year--is phasing veteran teachers into the program; all new teachers are required to participate.

In New Mexico, the legislature this year instructed the State Department of Education to continue study of such issues as performance pay. Last year's legislation called for proposals to be in by January 1985. Districts have submitted proposals, but no funding is forthcoming this year.

In Louisiana, a Task Force appointed to develop a plan by January 1985 for consideration by the legislature this year was unable to come to a consensus and was disbanded. Legislation has been introduced in the 1985 legislative session to pilot an incentive program.

These approaches contrast with those in Florida, Tennessee, and Texas, which implemented statewide programs within one year after passing the legislation. The Tennessee Department of Education asked for and received additional funding to double the number of evaluators to facilitate moving teachers into the two highest levels of the career ladder. Legislation was introduced in Texas to speed up movement of teachers to higher levels, but was defeated this year (as were all proposals to alter the 1984 education reform bill).

Trends in Teacher Evaluation

Evaluation in career ladder programs that are being developed or implemented focuses on classroom performance of teachers and includes other factors, such as knowledge (determined by a written test), professional activities, additional responsibilities, and student achievement. Most plans utilize a team approach (school principal and peer teachers) to remove perceived bias in the evaluation procedures. The new Alabama plan calls for the principal to be responsible for teacher evaluation. The states implementing plans have recognized that evaluators require extensive training in classroom observation.

Several states now include student achievement among the sources of data for evaluating teachers. The three models to be piloted in South Carolina during 1985-86 all include student achievement in determining which teachers or schools will qualify for performance compensation. Student scores will not be used directly, but will be used as a part of a portfolio of information a teacher submits in documenting job performance. This approach has been used in some district plans in other states, such as Virginia and Utah. New plans this year include Georgia's legislation which calls for rewarding teachers with above average competencies and performance, and may include student achievement. The Alabama plan calls for including subject matter knowledge, classroom performance, and student achievement in evaluating teachers. The proposed Kentucky pilot program includes student achievement as a factor in evaluating teachers.

As states and districts implement their plans, refinements in the procedures are proving to be necessary. For example, in Utah, the State Office of Education has outlined more stringent standards for evaluation after the legislature increased funding but asked that local districts place increased emphasis during the coming year on the performance component of the career ladder plan. A comprehensive review of Utah's first year of implementation showed that most districts had begun to revise their teacher evaluation procedures. Evidence of student achievement is a provision in slightly over half of the plans, and about a third of the districts now use peer review. The reviewers noted the importance of time and resources to complete the task of redesigning evaluation practices. Tennessee is reviewing evaluation procedures to make necessary technical adjustments in the evaluation system.

In Florida, the evaluation system used to choose teachers for the Master Teacher Plan has been criticized and is under review. Teachers who reach the upper quartile on both a classroom performance observation and a subject area test are to receive a $3,000 bonus. Early reports on the classroom observation show differences in the proportion of teachers in each district reaching the upper quartile; the same was true for the subject area tests. Officials with the program have offered a number of reasons for the statewide evaluation process not identifying similar proportions of teachers in districts across the state. Teachers volunteered to participate in the plan. Some districts encouraged teachers to apply for the program, others did not. Some districts provided intensive training efforts for their teachers. (The literature on which the instruments were based shows that the more teachers know about effective teaching the more likely they are to demonstrate it in the classroom.) Some teachers were told when they would be observed, others were not. Although funding for more than 6,000 awards was available, only 2,500 teachers scored in the upper quartile on both instruments, thereby reducing by more than half the numbers of teachers who could have received the bonus. About 10,000 teachers have asked to be reevaluated for the program by a third observer. (Originally, they were observed by a school administrator and one other evaluator.)

Implementation

A number of states that enacted legislation in 1984 have made substantial progress in implementing their plans. Several issues emerge, such as participation, funding, and evaluation of the programs.

Participation in Programs

Participation in most career ladder plans is optional for currently employed teachers; in some states it is mandatory for new teachers. Despite controversy surrounding the enactment of plans, teachers are electing to participate in programs in greater numbers than expected. Over 92 percent of the Tennessee teachers and administrators eligible to participate (those with three or more years of experience) applied for and advanced to Career Level I. Of the 39,800 total, approximately 8,000 applied for evaluation at upper levels. In Florida, over 25,000 (approximately 60 percent of those eligible) applied for Associate Master Teacher status.

In states implementing local plans or pilots, district participation is usually optional. In Utah, all districts elected to be a part of the career ladder plan. In North Carolina, over 50 school districts sent in proposals to be part of the 16-district state pilot project. In South Carolina, 14 of the state's 30 districts applied for the approximately 10 planning grants for incentive programs funded by the state. In Maine, several local districts are participating in the pilot project, even though they were not among those selected for state funding.

In Florida, half of the state's 67 school districts applied for the School Incentives Project (school-based incentive plan), which required agreement of the collective bargaining unit in each district before submission.

In California, about three-fourths of the districts (representing over 90 percent of the state's teachers) are participating in the Mentor Teacher Program. Over 5,000 mentors were working in teacher training, curriculum development, and classroom coaching and support in 1984-85. According to a recent study of the implementation of the California plan, collective bargaining influenced how quickly the mentor programs started. While bargaining caused delay in several districts, in many it may have contributed to teacher acceptance of the program. In several of the districts, however, not enough qualified applicants applied for the positions, which sometimes required moving into high priority situations or taking on additional responsibilities.

The initial response to the New Jersey Master Teacher Program has been less enthusiastic. Only 10 of the state's 600 districts applied for the pilot program. Five were selected, but only one is participating.

Funding—Its Effects on Implementation

Funding limitations clearly affect the implementation of career ladder plans. Many would argue that incentives should not be competitive but, rather, should be available to all who meet the criteria. On the other hand, estimates of numbers who will receive awards are necessary for budgeting purposes. It is difficult to project costs of incentives in the absence of quotas. For instance, in Alabama, projections of costs for the first five years of a career ladder program ranged from $720 million to $1.5 billion.

Funding will restrict the number of teachers or school administrators who ultimately will be able to move into or up on a career ladder plan—whether that notion is "up front" in terms of limitations or quotas or whether the programs are open to all who meet the standards.

Some states have specified the number of teachers who will be eligible for awards. California legislation provided for up to 5 percent of teachers in each district to be eligible, although actual funding was for only 2.5 percent. Funding for the Florida Master Teacher Program allowed for 6,333 teachers to receive a $3,000 bonus. An assumption in predicting funding levels for the South Carolina plan is that approximately 20 percent of the teachers or administrators will qualify for the plans that will eventually be put into place statewide.

Other states have set standards and have stated that all who meet the criteria will qualify. Tennessee has allocated substantial amounts of money to fund its program: $50 million, $85 million, and $122 million, respectively, over the first three years. The legislature granted a supplemental appropriation of $12 million for the first year to provide for teachers and administrators who applied and qualified for the first career level. Once the program has been fully phased in, however, a rise of more than 5 percent in the number of teachers moving into upper levels each year will trigger legislative review.

In some states, funds are allocated directly to districts. In Utah, funds were allocated to local districts for both planning and funding of incentive supplements in the amount of approximately $1,000 per teacher in the first year. A recent study suggests that all districts promoted all candidates who met the standards at the first level of the ladder, but that most districts used competitive procedures for making awards at the upper levels. Funding for the second year has doubled, which should allow greater flexibility in redesigning plans and in making awards.

In the Texas plan (partially funded from the state and partially from local funds), some districts that were not able to pay the recommended $2,000 per teacher to all who qualified for Level II of the ladder paid teachers $1,500. Some districts are imposing standards which are stricter than the minimum state standards called for in the plan because of funding limitations. The Dallas Independent School District placed 60 percent of its teachers at Career Level II by supplementing state funding.

In addition to the cost of the incentives themselves, there are many other costs associated with incentive plans, such as benefits, staff time in planning and administering the program, and performance appraisal. The cost of the evaluation process itself is substantial and can include evaluator salaries (or the cost of released time), training of evaluators, and scoring and analyzing data.

In California, in addition to the $4,000 stipend awarded to each mentor teacher, the state provides districts with $2,000 per mentor to cover support costs, such as training and released time for mentors. However, according to a recent study, several districts deemed this amount insufficient to cover costs of substitute teachers if mentor teachers perform their duties during regular class time. The law allows mentors to spend up to 40 percent of their time on activities outside the classroom. As a consequence of limited funds for substitutes, many mentors perform their duties after hours or during vacation time. This limits opportunities to work with other teachers in a classroom setting. Only 10 percent of the participating districts used additional local funds for support of the mentor teacher program.

This is an important issue for all states, since most of the career ladder plans provide for exemplary teachers to function as mentors. Considerable attention has been given to selection procedures in all state plans in an effort to insure fairness. The next phase is equally important, however. What do mentors actually do, and what kind of training do mentors need in order to perform this function well and to assure acceptance by their peers?

One outcome of the funding of career ladder plans has been that some states have given across-the-board increases to all teachers in tandem with allocating money for the incentive programs. In Tennessee, all teachers received a 10 percent increase. The Georgia legislature gave teachers a nearly 12 percent increase; beginning teacher salaries were raised to a state minimum of $16,000. In Texas, all teachers received at least a $170-per-month increase when the career ladder was passed; salaries were raised for beginning teachers from $11,000 to a state minimum of $15,200, and the top state salary for experienced teachers went from $21,500 to $26,600. Alabama has given non-tenured teachers a 5 percent raise; tenured teacher salaries were increased 15 percent for 1985-86.

In funding incentive programs, states either establish quotas or they estimate the numbers of persons who will qualify. Whether states intend to establish quotas or give incentive supplements to all who qualify, it is critically important to allocate sufficient funds. The reality in some states is that funding limitations may restrict the number of persons who qualify, reduce

the amount of the awards, or cause limitations on the distribution of funds among various levels of a career ladder.

A final issue yet to be tested is whether states have a long-term commitment to funding the incentive plans. At least three states—Tennessee, California, and Utah—have increased funding for their programs for the coming year. If the incentives are to be seen by teachers as worth achieving, funding over the long term must be assured.

Program Evaluations

Evaluation of programs in the implementation stage is just beginning and additional evaluation of programs by outside agencies should be undertaken. In Utah and California comprehensive studies have been made.

In Utah, a Career Ladder Research Group at the University of Utah and the School/Community Development Section of the Utah State Office of Education have completed a report, *Career Ladders in Utah: A Preliminary Study, 1984-85.* Major findings include the following: local district plans show considerable variety; career ladders have spurred local districts to revise methods for evaluating teachers and to consider using peer review and multiple lines of evidence, including student achievement; most districts elected to use some of their money to pay teachers for additional work days; and, while some of career advancement funds were used for teachers who took on extra responsibilities, fully 19 of 46 districts used merit increments for high performance in the classroom without additional responsibility. The researchers believe that over time the elements of the plans that contribute to the improvement of teaching will be retained and that the plans will converge as the districts learn from one another. Office of Education personnel have expressed the opinion that a strength of the Utah approach is the ownership of each district because of local involvement in design and implementation of the plans.

Two analyses of the California Mentor Teacher Program are available. The first is found in Chapter 3 of a 1985 report on the omnibus education reform package issued by the California Tax Foundation; the second is a cooperative study undertaken in 1984 by the Far West Laboratory for Educational Research and Development and the California State Department of Education. The reports analyze the effects—which were both positive and negative—of collective bargaining in getting the program started. They also examine the typical responsibilities of mentors. The law states that the primary function of mentors is to provide assistance to new teachers; they may also assist experienced teachers and work on staff development and curriculum. While most districts indicated that their mentors performed all these functions, curriculum development was the most commonly mentioned. This may have been because districts placed a higher priority on it, or because of mentor uneasiness in working with peers.

The Tennessee Department of Education is currently undertaking a thorough review of the evaluation system. The Department is using teacher, principal, and superintendent study councils as sounding boards; reviewing questionnaires sent to all Career Ladder candidates and other educators; debriefing the evaluators, and relying upon external evaluation by outside experts. The purposes of the review are to make any necessary technical adjustments and to build increased confidence in the evaluation system.

Researchers at the University of Tennessee recently completed the final report of the *Teacher Incentive Research Grant,* funded by the U.S. Department of Education and the University of Tennessee. The study examined the development and implementation of the Tennessee Career Ladder Program through interviews with teachers and administrators, teacher surveys, and questionnaires.

Interviews conducted in the fall and spring of this year indicated difficulties in statewide communication about the program. Suggestions by teachers focused on input into the developmental process as well as the need to slow the pace of implementation. One of the most positive elements was the staff development model, a "fast-track" option to advance to Career

Level I. Teachers support the need for performance evaluation that shows a clear relationship to teaching performance, is resistant to bias, and is reasonable in demands on their time.

The Florida legislature has called for a review of the Florida Master Teacher program by the governor. The evaluation component and the administration of the program will be examined and recommendations on improvements will be made. Alternative merit pay and career ladder systems in other states will be reviewed. If the review is not complete by February 1986, the $6.6 million earmarked for the program this coming year will be reallocated to school districts. The School Incentives Project implementation is proceeding on schedule, and only minor changes were made in 1985 legislation.

Less formal evaluations have taken place in states and districts implementing career ladders and through media interpretations of programs. A common criticism has been that programs add too much paperwork. It should be noted that many teachers have spent much more time and effort at preparing portfolios to document activities than ever envisioned by planners of programs. Another common complaint among almost all programs is that in the early stages mixed signals were sent out, thus causing confusion among teachers and administrators about how a program would function. One strength of the Charlotte-Mecklenburg program has been the emphasis on the supervision and help given to beginning teachers. One principal recently noted that the relationship that has developed between mentor and beginning teachers has been a welcome outcome of the program. Charges that the evaluation system in the program centered too much on the mechanics of teaching as opposed to the content of teaching has brought about a change in the evaluation component of the plan.

In Florida, another kind of evaluation has taken place in the courts. Both the Associate Master Teacher Plan and the District Quality Incentives Plan (merit schools plan) were challenged by the two large teacher associations, which claimed that the plans were unconstitutional, discriminatory, and violated collective bargaining rules for establishing salaries. Both plans were recently upheld in a circuit court, but the decisions have been appealed.

One of the driving forces behind criticism of a plan like Florida's is that only a relatively small proportion of teachers are to be rewarded. This year, 90 percent of the persons attempting to qualify were not named Associate Master Teachers. When this happens on a local basis, the numbers do not seem so staggering, but on a statewide basis they become more significant. This may be one of the reasons that many states have moved away from a strictly merit type plan that rewards only a few teachers to the career ladder model which allows for large numbers of teachers to be a part of the system. In career ladders the percentage of teachers able to participate on some rung of the ladder is high, even though a relatively small percentage of the teachers may reach the master level.

Several other states, such as Maine and Arizona, have provided for or contracted with university groups to conduct evaluations of the new incentive programs.

Outcomes

It is too early to know the effect that career ladder and other incentive programs will have on attracting and retaining capable teachers and improving teaching and student learning. It is not too soon, however, to make some general observations based on the experience of programs currently in place.

1. Plans show considerable variation regarding who controls the program. Some plans have clearly defined state standards; others allow considerable local autonomy.
2. States are proceeding cautiously, lengthening the time for implementation, phasing in programs, or experimenting with pilot projects.
3. The career ladder movement has clearly stimulated changes in procedures for evaluating classroom performance of teachers.
4. School districts and teachers are volunteering to participate in the career ladder programs, often in greater numbers than anticipated.

5. Teachers and other educators are involved in planning, analyzing, and revising career ladder programs.

6. Incentive programs are expensive and the total costs can be difficult to predict. If the programs are to achieve their objectives, funding over the long term must be assured.

7. Formal program evaluation of incentive programs is limited to date. It is important that plans be evaluated by outside persons.

Career ladder programs may lead to a restructuring of the teaching profession (an intended outcome of many proponents of the concept). By design, career ladder programs introduce differences in status and rewards among teachers. For teachers in elementary and secondary schools this is new. It accounts for some of the initial teacher opposition to career ladders and requires a readjustment in thinking. When legislatures establish programs, the emphasis is usually on selection procedures. However, once a program is in place, attention is focused on appropriate roles of teachers in the various career levels. Teachers are just beginning to move into the new roles. The idea that some exemplary teachers can be viewed as mentors or as master teachers with expertise to be shared is gaining acceptance.

Closely related is the issue of providing aid to new teachers during the probationary period. Most plans specify that one of the tasks of upper-level teachers is working with new teachers. (The idea of providing a mentor to assist new teachers has been adopted by many states, even those without career ladders.) Evaluations of the career ladder plan in Charlotte-Mecklenburg, the pioneering plan that has influenced the development of many state plans, show that more monitoring and assistance have been available for new teachers this year. This is an explicitly stated outcome of virtually all of the plans. Another outcome of the plans—although less explicit—is the encouragement of considerable discussion among all teachers about effective teaching, regarding both content and method. An evaluation of the Utah plan showed that teachers were also gaining leadership skills.

Career ladder programs have led to increased attention on redesigning practices for evaluating teachers. This is not entirely unforeseen. Evaluation systems are becoming more complex as they include multiple sources of evidence and systems for observing, recording, and analyzing what goes on in the classroom. One consequence is the increased burden of paperwork required for documentation of teacher performance. Another is the removal from the classroom of good teachers who serve as evaluators in systems that rely on peer evaluation. Whether these more complex means will improve teacher evaluation or become so burdensome that evaluation reverts to the simple rating scale used by principals is not yet known. The success or failure of the career ladder concept may rest in fair selection systems that do not evolve into expensive bureaucratic procedures at the state or local level.

A final issue is whether incentives alone can encourage teachers to perform better in the absence of changes in working conditions. Stated another way, can career ladder plans create opportunities for a fundamental restructuring of the profession that will improve working conditions and make possible more effective teaching? Many of the career ladder plans contain additional features— such as measures to improve instructional leadership by principals and to foster a collegial atmosphere by allowing teachers to help teachers— that offer considerable promise.

In general, the concept of providing differentiated responsibilities among teachers and rewarding exemplary teachers or teachers who are willing to take on new responsibilities is gaining acceptance. It may be true, in fact, that career ladder plans are driving a restructuring of the teaching profession. Success of the plans will depend on a continued sharing of information and the willingness of districts and states to modify programs as they are implemented.

Summary of 1985 State Actions on Career Ladders

The following is a summary of state actions on performance-based incentive programs for teachers and administrators across the nation. Several states have no specific proposals at this time and, consequently, are not included.

Alabama

The Alabama Performance-Based Career Incentive Program Act, passed during the 1985 legislative session, establishes a career ladder program. The first phase, to commence immediately, will allow all teachers to be placed on the ladder as either a probationary (non-tenured) teacher or a Professional Level I (tenured) teacher. All non-tenured teachers will receive a 5 percent raise; tenured teachers a 15 percent raise in 1985-86.

A working committee, composed of a majority of teachers, will establish the evaluation system and the guidelines for putting the plan into operation. The governor will appoint 5 members (3 teachers); the Alabama Education Association (AEA) will appoint 15; and the state superintendent will appoint 15 from groups such as school administrators, lay public, business and industry, and parent-teacher organizations. The AEA will also appoint 5 members and have approval over the other 5 appointees of the State Superintendent for an Educator Performance Review Re-evaluation panel. The State Superintendent has review power over the appointees of the AEA. The panel will provide a statewide review in an appeals process for teachers after an appeal has been exhausted at the local level. This is the first statewide plan that has included a teachers' organization in such a formal role.

The plan outlines the criteria to be included in the evaluation, such as classroom management practices, competence in subject matter, and student achievement. Principals will have the primary responsibility for the teacher evaluation process, with supervisors and assistant principals involved. The state appraisal system is to be implemented in 1986-87.

Phase two, beginning in 1987-88, will allow teachers to move to Professional Level II status; in 1989-90, Master Teachers will be named. Before phase two is implemented, a progress report on phase one must be submitted to the legislature, governor, and State Board of Education, and the legislature must pass a new bill reaffirming its commitment to the program.

Arizona

The 1984 legislature provided funding for 16 school districts to develop career ladder plans; a 1985 law allows implementation of some or all of the plans. The intent is to pilot the plans for five years in a few districts before the legislature decides about encouraging implementation of career ladders statewide.

Each career ladder plan must specify how the plan is to improve student academic achievement and criteria for each step in the career ladder. Evaluation procedures are to include more than one measure of teacher performance, including student achievement. Teachers must be involved in planning. School districts that receive state funding will be selected by a joint legislative committee by June 30, 1985.

To implement the program, districts will receive an increase in their base level of funding. If all of the eligible districts are selected by the joint legislative committee, the program will cost $1.2 million in 1985-86, increasing to $20 million in 1988-89. Fifteen of the districts have requested funding. A center of excellence in education at a state university, to be designated by the Board of Regents, will evaluate the career ladder programs and will report to the joint legislative committee by October 1989.

Arkansas

1985 legislation created a 7-member Teacher Career Development Commission to be appointed by the governor this year. According to the bill, each school district in the state which pays its teaching personnel above the average Arkansas teacher's salary for 1984-85 may submit a proposal for a district career development program to the Commission by November 1985. If a district engages in professional negotiations, the program will be developed through the negotiation procedures. If less than 30 percent of a district's teachers indicate an interest in participating, then the district cannot submit a proposal.

The Commission shall establish six pilot programs; $500,000 is available to fund the projects. The results of the pilot projects will be evaluated by the Commission and recommendations are to be made to the Board of Education by April 1987.

California

The California Mentor Teacher Program was created in 1983; funding for the program began in the second half of the 1983-84 school year. During the 1984-85 school year, 741 school districts—which include more than 90 percent of the state's teachers—participated in the program. Although legislation allows up to 5 percent of a district's teachers to become mentors, state funding has been provided for about 2.8 percent, at a total cost of $30.8 million. Over 5,000 mentors were designated in 1984-85.

For FY 1986, it is anticipated that the legislators will approve $44.5 million for the program—an amount sufficient to provide stipends and support costs for about 4.5 percent of the state's teachers. Each mentor receives a $4,000 stipend, while the local district receives an additional $2,000 per mentor to cover support costs, such as training and released time. Mentors must spend at least 60 percent of their time teaching their own pupils. In addition, other responsibilities are assigned as a result of joint decisions of both the mentors and their local districts.

Participation by local districts in the mentor program is voluntary and is not subject to collective bargaining. However, local districts could—and many did—negotiate issues such as procedures of the local selection committees, released time, mentor responsibilities and duties, and use of support funds. According to two reports that provide information on the implementation of the program, while bargaining may have slowed implementation in a few districts, the discussions may have contributed to teacher acceptance.

The local selection committee, of which a majority must be teachers, nominates exemplary teachers, who are then appointed by the local boards to serve as mentor teachers. According to the reports, procedures for selecting mentors and the duties they assume vary considerably across districts. The typical duties were those enumerated by the legislature: assisting new teachers, teacher training, and curriculum development.

Although, according to one of the reports, the program "is not merit pay, but rather extra pay for extra work for teachers with exemplary abilities," some proponents see the plan as a precursor to the development of career ladders. The Superintendent of Public Instruction and the chairmen of the Senate's and Assembly's Education Committees created the California Commission on the Teaching Profession to conduct a 15-month study of the profession and make recommendations to policymakers. The Commission, which began work in August 1984, is considering a range of policy options.

Colorado

In 1984, the Colorado legislature enacted a bill permitting local boards of education to develop and implement pilot alternative salary policies that considered a teacher's performance as one of the factors in determining a teacher's salary. Three school districts took the lead in developing programs under this permissive legislation.

The 1985 legislature allocated $400,000 for the development of alternative salary and career ladder approaches to teacher advancement. Funds may be used to study, develop,

and pilot local projects. It is anticipated that districts will apply for funds to develop alternative approaches and will probably have to fund any salary supplements themselves. Funding for these alternative approaches—and other programs to assess school improvement initiatives—was derived by reducing the state share of equalization support to local districts by $2 million. This unusual approach to funding was advocated by a coalition of education community representatives, including representatives from the state board, teacher organizations, and school boards. The Department of Education must report its findings to the legislature by November 15, 1986. In addition, a newly-appointed Commission on Higher Education will assess the quality of teacher and administrator education programs and their graduates, and make recommendations regarding improvement and possible consolidation of undergraduate and graduate programs in education.

Connecticut

In November 1984, the Certification Advisory Council issued a report with recommendations for a certification continuum consisting of three tiers: initial, provisional, and professional certifications. To progress from initial to provisional, a teacher must successfully complete a beginning teacher program. The Council also recommended a master teacher plan to recognize outstanding performance. The State Board of Education adopted in principle the certification continuum (but not the master teacher plan) and legislation was introduced reflecting the recommendations. The legislation was held in committee, but will likely be introduced again in 1986. In a related matter, the governor appointed a state-level commission to consider salaries, certification, and a five-year teacher preparation program. These issues were discussed in public hearings; a report is expected at the end of June.

Additionally, the State Department of Education, under a U.S. Department of Education grant, is working with seven local school districts to develop criteria, incentives, and rewards for exemplary teaching. Some of the plans developed by local districts in this program will include career ladders. The Department will share these plans with other districts throughout the state.

Delaware

The 1984 legislature passed a resolution that career development plans be developed for school employees. Several proposals have been developed since then, including a study commissioned by the legislature. This year the Joint Finance Committee's proposed budget includes a 5.5 percent across-the-board salary increase for teachers, and adds an increment at the highest step. In addition, $2.3 million for fiscal year 1986 is budgeted for a Career Development Accountability Program, contingent on legislation. Legislation has been introduced that would establish a task force to develop a plan in which teachers would be eligible for supplements ranging from $1,000 to $6,000.

Florida

The Florida Master Teacher Program has named approximately 2,500 teachers to receive the Associate Master Teacher status and a bonus of $3,000. The 1984-85 funding provided for approximately 6,000 teachers to qualify. To receive the bonus, teachers had to score in the upper quartile on both a subject area test (or hold a master's degree if no test was available in the subject) and a classroom performance observation. The observations were conducted by the school principal and one other observer. The number receiving the award may increase because teachers scoring above the 50th percentile were allowed to request an additional observation by a third observer. Those evaluations will probably not be completed until next fall.

The 1985 legislature appropriated an additional $6.6 million in funding for fiscal year 1986 for the program. A proviso calls for a study of the program by the governor, with recommendations to be made to the House and Senate appropriations committees by January 1986. If no report is made, the funds will go to the general operating fund in the

schools. The areas to be studied include the procedures for administering and implementing the program, the appropriateness of the evaluation system, and the validity of the tests. The report is also to make recommendations concerning possible alternative systems.

A second program, the School Incentives Project, which awards bonuses to upper quartile schools in districts, is completing its first year. Thirty-one of the state's 67 districts submitted plans that were approved; $20 million is to be awarded to the schools. Selection criteria stipulated that relative student gains on a standardized test had to be used this year. Plans were a part of the collective bargaining process at the local level. In some districts, awards are going directly to school personnel; others are using the funds for additional school equipment. Funding for 1985-86 has been set at $10 million. Changes in the plan for next year include the use of absolute gains in student achievement scores as a part of goals and objectives to be met by schools.

Georgia

The 1985 Georgia General Assembly passed legislation directing the State Board of Education to devise a career ladder program to reward teachers and school administrators with salary supplements. Teachers and "certified non-teaching personnel" who demonstrate above average or outstanding competencies relative to skills and their field and exhibit above average or outstanding performance (which may include the achievement of students) will be eligible for the rewards. A 33-member Task Force is to be appointed to advise the State Board on the development and implementation of the career ladder. It will be composed of teachers, administrators, other system employees including superintendents and counselors, legislators, and lay persons. Development of evaluation instruments, revising certification standards, and study on the use of student achievement data will begin this year. Funds for the program shall be provided by the state, with no local fair share money to be used for the program. The career ladder plan is to be developed and approved by the State Board of Education by July 1986.

Idaho

Legislation enacted in 1984 permits school districts to participate in the Teacher Excellence Program. The legislature appropriated $100,000 for administration of the program and assistance to local districts in developing Career Compensation Plans in FY 1985, with a view toward implementing the plans the following year. The 1985 legislature, however, did not appropriate funding for the local career compensation plans because of economic conditions; instead, it provided $90,000 for the State Department of Education to continue its local district assistance program, with a verbal commitment to address the career ladder issue in the 1986 legislative session. As a result, districts have another year in which to develop their career ladder plans and evaluation systems.

According to the State Board of Education regulations adopted in January 1985, districts electing to participate must develop and submit to the State Board of Education a Career Compensation Plan, approved by the local board of trustees, that 1) includes a career path for teachers consisting of at least three or more career levels (similar plans for other certified personnel, including administrators, are permitted but not required); 2) provides opportunities for extended teaching contracts; and 3) provides opportunities for teachers to apply for and receive training grants. Guidelines are broad enough to allow local districts flexibility in devising plans. Local districts will design plans for evaluating performance using sources such as classroom observations, individual portfolios, questionnaires, interviews, and tests. In planning for school improvement, a district committee could allocate much of the career compensation funding for training grants and extended contracts in the early years and in later years shift the funding to career ladder stipends. Though the new deadline for submitting plans is May 15, 1986, it is anticipated that districts will complete their plans prior to the legislative session which begins in January.

Illinois

The General Assembly passed a joint resolution urging local districts to provide a wider array of roles and responsibilities for teachers and, in doing so, to provide for careers within teaching that have varying rewards and responsibilities. It also urged districts to develop and maintain systems for recognizing outstanding performance. These recommendations had been made in January 1985 by the Illinois Commission on the Improvement of Elementary and Secondary Education.

The governor's Better Schools Program contains a provision for a center on teacher excellence that would study performance pay systems and encourage planning and pilot programs. If the legislature adopts the plan, funding for the study is likely to be provided.

In Illinois, 19 local school districts (out of 1,004) have some form of merit or performance-based salary schedule for teachers; most are small districts.

Indiana

The legislature has appropriated $6 million to be used over the next two years for a teacher quality and professional improvement program. The State Board of Education will review the salary and reward structure for teachers and identify and develop methods to confer honor upon the teaching profession and individual teachers.

Each year $500,000 of the total appropriation will be devoted to developing a plan for the implementation of a comprehensive career ladder system. The Board will select and assist three local school districts to serve as model field studies for the feasibility of career ladders. Provisions also allow the Board to work with local districts to study the implications of a career ladder on collective bargaining, to make recommendations regarding basic pay increases, to create additional professional development opportunities, and to study ways of rewarding districts that improve the work environment by fostering collaboration among teachers.

The State Board will present recommendations to the legislature by November 15, 1986. If approved by the legislature, the State Board will implement a comprehensive career ladder system with basic pay increases to be phased in over a three-year period beginning July 1, 1987.

Iowa

Iowa's Excellence in Education Task Force recommended in its October 1984 report, *First in the Nation in Excellence,* that the State Board of Public Instruction study the feasibility of a career ladder system that would be tied to the certification process. Subsequently, the Department of Public Instruction proposed rules revisions that could be adopted under the current authority of the State Board.

The Department has proposed a four-tier certification structure—provisional, educational career, professional teacher, and master teacher. Progress on the ladder requires evidence of successful teaching as evaluated by a local team of educators and the completion of advanced coursework. Candidates for master teacher, who would have at least 10 years of teaching experience and a specialist degree or its equivalent (at least 30 semester hours beyond the master's degree), would be evaluated by a state team of educators composed of administrators and teaching peers. The State Board will consider the proposal this winter and the proposals could take effect in July 1986.

In addition, other proposals related to career ladder concepts were considered by the legislature but did not pass. One would have provided funding for reduced teaching loads for provisional and master teachers and $2,000 stipends to master teachers. This is likely to be considered again in the next legislative session.

Kansas

Discussion of career incentive programs has been underway since 1984 when a legislative committee began examining the approaches of other states. Currently, the Commissioner's Task Force on Teacher Incentive Structures, a broadly representative state-level group, is meeting as part of a three-phase planning project funded by the U.S. Department of Education. The first phase resulted in the publication of a policy issues paper, *Merit Pay for Teachers: An Analysis of State Policy Options,* that compares statewide and local approaches. The Task Force, which had its first meeting in March 1985, is charged with drafting and proposing a state policy, expected to be completed by fall. At regional hearings that will follow, the Task Force will present the proposed policy and receive suggestions to be used in modifying and finalizing a recommended state policy for consideration by the legislature.

Kentucky

A Task Force, appointed by the governor according to 1984 legislation, will present its report by July 1, 1985. The recommendations call for a pilot program in 5 to 10 districts to be established in 1986-87, with recommendations on a statewide program to be presented to the 1988 legislature (the Kentucky legislature meets biennially). A commission, appointed by the governor, will oversee the piloting and make recommendations on a statewide plan.

The proposal includes a 4-step ladder, with teachers being evaluated by a three-member team: the principal, a state evaluator, and a trained evaluator in the region from outside the teacher's district. Evaluation would be based primarily on instructional performance, with professional growth and development, professional leadership initiative, and student achievement included as other factors. A year of internship would be followed by Step I, with a 9¼-month contract. After 4 years of teaching, advancement to Step 2 could take place. Step 3 requires 7 years of teaching experience. Ten years of experience are required to reach Step 4. Teachers at Step 3 would work a 9¾-month contract; at the top level teachers would be required to work 11 months. A master's degree would be needed to reach levels 3 and 4. At the time of implementation, all new teachers would be required to be a part of the career ladder. Provisions call for all presently employed teachers tc have three years to decide whether to enter the program.

Louisiana

A Career Ladder Commission, created by 1984 legislation and required to submit a report in January 1985, was unable to come to agreement on a recommended plan. The Commission has been dissolved by legislative action. Since then, the governor, the legislators, and the State Department of Education have offered various incentive proposals for teachers.

A bill that passed the Senate and is being considered by the House—the Teacher incentive Pay Models Program—provides for inviting districts to submit proposals, approving those plans, and establishing pilot projects. Proposals would be submitted to the State Department of Education by September of 1985; ten will be selected by January 1986. These districts will receive a $30,000 grant to fund implementation for the 1986-87 school year. Three programs are to be funded for a second year. One program,to be used as a model for a statewide plan, is to be selected during the 1987-88 year. Legislative enactment is necessary for statewide implementation. Models are to be: pure compensation plans (based on performance), career ladder plans based on longevity and evaluation, and career ladder plans that include extended time or responsibilities.

Maine

A teacher certification law enacted in April 1984 establishes three levels of certification—provisional, professional, and master teacher. The concept is being piloted for two years in 13 local sites; 7 additional sites are participating without state funding (the 20 local sites involve a total of 30 school districts).

Beginning teachers serve a two-year provisional term, during which their progress is supervised and evaluated by a support system consisting mainly of teachers. Criteria for evaluation include professional skills in the classroom and knowledge of subject matter as defined by the piloting site. After successfully completing the provisional term, teachers will be granted a renewable five-year professional certificate. Professional teachers may apply for a master teacher certificate.

While state money is not specifically designated for extra pay, some districts are using project money for stipends. An advisory committee will monitor the program and make final recommendations to the legislature.

Maryland

Legislation enacted in 1984 provided additional state education aid to improve instruction and student performance in local districts. The law specified that districts could allocate funds for incentive pay programs. As a result, incentive programs are emerging at the local level.

The Board of Education of Frederick County adopted the Teacher Plus Program in December of 1984 to reward distinguished performance in teaching. A selection committee composed of seven teachers and three administrators recommended 117 of the 178 applications (self-nomination) for three-year assignments beginning in 1985-86. Additional teachers will be added during the next two years of the program. Teachers receive an additional 10 days of pay to complete a teacher-devised (system-approved) plan for professional development. Classroom teachers will also be provided time during the normal day to make use of the teachers' professional talents.

Prince George's County Public Schools have created several positions which can be categorized as elements of a career ladder. The "teacher coordinator," selected by building principals, assumes three regular high school classes and becomes a subject area coordinator, receiving a $500 stipend. Another position is the "instructional/administrative specialist." These teachers provide a mobile force of instructional-administrative support for elementary schools. This is an 11-month position and carries an additional salary of from $1,213 to $2,413, depending on length of service. A third position is the "instructional support teacher," a position created to serve as a resource to provide small-group instruction for students and work with teachers.

A merit system for school principals in the Baltimore City Public School System went into effect this past school year. Principals are evaluated against a set of objectives that includes student achievement. The district will examine the idea of extending the system to other employees, including teachers.

The Baltimore County Public Schools System has a study committee, composed of teachers and others, to identify appropriate incentive plans for teachers. The committee is receiving input from teachers and citizens and is identifying the types of incentives teachers find rewarding. The report of findings is due in September 1986.

Massachusetts

A bill, passed by the House and awaiting Senate debate, would create positions known as Horace Mann Teachers who would eligible to receive state grants up to $2,500 for performing extra responsibilities, such as training teachers, developing curricula, and providing special assistance to dropouts or potential dropouts. The State Board of Education would establish principles and standards to be used by local school committees for evaluation and selection of teachers; however, local committees could establish more rigorous standards.

In addition, the pending legislation would establish the Teacher Career Advancement Program to be piloted in three local districts selected by the State Board of Education. The career ladder would consist of four tiers, with increased salary supplements for each tier. Participation by teachers would be voluntary. Criteria for advancement would include

evaluations conducted by department heads and principals. The state would pay the costs of the program, which would last until June 30, 1989.

Michigan

In March 1983, the State Board of Education approved the concepts contained in a paper entitled *A State System for Educational Personnel Development: A Continuum Model.* In January 1984, the Board further explained its position in *Better Education for Michigan Citizens: A Blueprint for Action,* saying, "The concept of master teachers, or career ladders for teachers, was not an explicit part of the Continuum Model; however, a career ladder/master teacher system, arrived at through the collective bargaining process, would be in harmony with the rationale which supports the Continuum Model." There have been no proposals for career ladders, however. Instead, Michigan is developing a new plan for professional development of teachers.

Minnesota

The legislature enacted permissive legislation allowing local school districts to allocate a portion of their foundation aid for recognition of exemplary teachers and encouraging districts to increase staff development opportunities for teachers. The State Department of Education will provide technical assistance and guidelines to local districts.

Mississippi

Legislation in 1985 calls for the State Board of Education to develop a personnel appraisal and compensation system to be implemented by the 1987-88 school year. The legislation—which provided a $2,400 pay raise for teachers in 1985-86, $1,000 in 1986-87, and an average raise of $1,000 during the next year—stated that the $1,000 raise during the third year is to be paid on the basis of merit.

Mississippi was awarded a grant from the U.S. Department of Education last year to develop a proposal for a Career Ladder Plan for the state.

A 17-member committee, chaired by one of the state's district administrators, will submit a report to the State Board of Education in December 1985. The committee is composed of teachers, administrators, higher education representatives, laypersons, and two legislators. A plan will be submitted to the 1986 legislature. It is expected that pilot programs might be established during the 1986-87 school year.

Missouri

An education reform package just passed by the legislature establishes a career ladder program to become effective in 1986. A model career ladder plan and guidelines are to be developed by the State Department of Education by early 1986. Each district that chooses to participate is then to develop a career plan according to state guidelines. Programs will be funded jointly by the state and the local districts, with districts funding the program on a sliding scale according to district wealth. All plans will contain three steps for advancement, with supplements ranging from $1,500 to $5,000. These stages are to be phased in over a three-year period; initial state funding of $22 million is scheduled to increase to $46 million. Legislation also established minimum state teacher salaries of $15,000 in 1986-87, going to $18,000 in 1989-90.

Nebraska

Legislation in 1984 provided for changes in the teacher certification process and established a four-tier career ladder; however, state stipends for the four levels were deleted. A bill providing stipends was reintroduced in the 1985 session, but received no action due to economic constraints.

The new certification process, applicable to new teachers, provides for a three-year, non-renewable apprentice certificate; a five-year, non-renewable initial teaching certificate; a

five-year, renewable standard teaching certificate; and a ten-year, renewable professional teaching certificate. Teachers may move up through the four steps more rapidly than the full term of each certificate if they meet requirements based on satisfactory evaluations and achievement of additional education. Apprentice teachers must successfully complete an entry-year assistance program. To implement the program a new certification rule will be developed by the Department of Education by July 1986.

Nevada

The Nevada Committee on School Improvement Through Teacher Incentives has recommended that local school districts be encouraged to develop programs of monetary and non-monetary incentives for teachers. The Committee's work was funded by a U.S. Department of Education grant. The April 1985 report concludes that no single approach to incentives should be imposed; instead, districts should plan their own systems and apply to the Nevada Department of Education for approval and funding. The Committee also recommended that base salaries be raised before establishing incentive programs; that valid and reliable evaluation systems using multiple data sources and well-trained evaluators be developed; that incentives be subject to collective bargaining; and that any incentive system should give first priority to teachers and consider including administrators at a later date. The recommendations were directed to legislators and state and local education agency personnel.

Legislation providing funds for incentive pay for teachers was introduced in the 1985 session, but was not enacted.

New Hampshire

The State Board of Education approved an 11-point model which encourages local districts to adopt compensation plans that raise teachers' salaries to levels competitive with those of other professions, reward on the basis of individual performance, and provide flexibility for salaries to respond to supply and demand differences of various teaching disciplines. Design and funding of the plans would be up to local districts. At least two local districts are developing compensation plans based on performance. The state provides only 8 percent of school funding in New Hampshire. The 1985 legislature introduced, but did not pass, a bill calling for the development of a model for teacher evaluation. It did, however, request further study of a proposal for a mentor teacher plan for possible action in 1986.

New Jersey

One school district is participating in the three-year New Jersey Pilot Master Teacher Program. Local school districts submitted proposals, developed jointly by school board members, administrators, and representatives of teacher organizations, to a seven-member state panel. Five districts were selected from 10 proposals; two decided to go forward. The districts established their selection committees (composed of a majority of teachers) to review nominations and to select 5 percent of the district's teachers to receive $5,000 stipends. However, at the end of the first year one of the districts was asked by the state to withdraw from the program because of problems in the teacher selection process.

The program calls for master teachers to train new teachers and, during the summer or the school year in the equivalent of an eleventh month, to take on additional projects, such as research in their subject field, curriculum development, or conducting workshops. At the end of the first year they must pass a performance review conducted by their direct supervisors.

Two proposals for a teacher recognition program were introduced in the 1985 legislative session. The governor proposed that districts volunteering to participate could select up to 5 percent of their teachers to receive awards of $500. In each district a panel would select outstanding teachers. This plan would cost about $2.2 million. The legislature passed a plan proposed by the New Jersey Education Association in which the awards would go tc the

teachers' schools instead of individual teachers. The governor and legislature are currently negotiating over the teacher recognition program and legislation providing for a minimum salary of $18,500 for beginning teachers.

New Mexico

The 1985 legislature requested continued study of performance-based pay systems, incentive pay plans, and career ladders for public school teachers and administrators. During this second year of study the State Board of Education and the governor's Office of Education, in cooperation with local school districts and their teachers, will submit recommendations to the legislative education study committee by November 1985.

Earlier, the State Department of Education prepared two studies to assist local districts in designing plans. The studies were *Merit Pay or Performance-Based Reward System: Will it Work in New Mexico?* (January 1984) and *Putting It All Together: A Guide for Local Educational Agency Personnel Choosing a Performance-Based Pay System* (August 1984). In January 1985, all local districts submitted progress reports on their planning; several submitted formal plans. To date, no state funding has been provided to implement plans.

By July 1986, all local districts must have in place a staff accountability plan, including a teacher evaluation and growth plan, that meets state guidelines. Many districts are already implementing such plans.

New York

The legislature considered, but did not approve, several proposals for career ladders drafted by the Senate Education Committee. Instead, it approved $103 million in supplemental school aid that can be used by school districts to increase teacher compensation (which could include career ladders) and to help implement provisions of the Regents' Action Plan or any other high priority program. The Action Plan, adopted in March 1984, is a comprehensive five-year reform plan which requires that school districts develop, among other things, annual performance evaluations of teachers and administrators.

North Carolina

The 1984 General Assembly mandated a Career Growth Plan for teachers and school administrators. The plan is to give recognition and pay based upon experience, ability, and performance. The State Department of Education was called upon to develop a program for piloting during the 1985-86 school year, with state implementation of a legislature-approved program by July 1986.

The State Department of Education developed guidelines for a program and selected 16 districts for the pilot sites. The 1985 legislature has supported a career ladder pilot program with 1985-86 as a planning year, and pilot projects to begin in 1986-87 that will continue for three years. During the planning year, a statewide evaluation system is to be field-tested and evaluators trained. Funding has been proposed at $11.2 million for the first year.

The Charlotte-Mecklenburg Program, a district program started in 1984, will continue and be an alternative model to be considered when a statewide plan is adopted. After the first year of full implementation, 137 of 150 veteran teachers were promoted to the first step on the three-step ladder and will receive a $2,000 bonus. Additional veteran teachers are to be evaluated next year. All beginning teachers are participating in the program, which gives new teachers extensive on-the-job training and supervision during their first four years in the classroom.

Ohio

The State Board of Education adopted a Master Plan for Excellence in December 1984. Recommendations included establishing a career ladder and peer review program for

teachers, creating a mentor teacher system, instituting an entry-year program for education graduates, and establishing a professional examination for prospective teachers. To date, no legislation has been introduced incorporating the recommendations. In April 1985, the Certification Advisory Commission recommended revised standards for teacher certification and revised standards for colleges and universities preparing teachers for possible action by the State Board.

Oklahoma

Legislation pending in Oklahoma on an Educational Reform bill includes teacher raises of $2,000 per teacher—an across-the-board increase of approximately 12 percent. A career ladder program is a part of the reform package, which is to be voted on by mid-July.

Oregon

The Oregon Action Plan for Excellence, adopted by the State Board of Education in June 1984, included recommendations for local school districts to improve their performance evaluation systems for teachers and administrators. It also called on the State Department of Education to provide assistance in developing models for staff compensation. These plans would recognize contributions to improved school performance or the assumption of increased responsibilities, as in career ladder plans. The 1985 legislature did not provide any additional funding to carry out these or other program items in the action plan, but did free up some existing funds. The Department is preparing guidelines and analyses of what other states are doing regarding incentives and compensation which local districts can use in devising plans. Local districts would provide funding for any incentives.

Pennsylvania

In 1984-85, the Department of Education awarded $4 million to local school districts for locally-developed efforts to improve instruction through training, to fund new programs developed by teachers, and to provide incentives to teachers. Of the state's 500 school districts, 497 participated in the program; five of them provided incentives to teachers for quality in instruction or special service. The program will be funded again in 1985-86.

The governor proposed, but the legislature did not enact, a $10 million Excellence in Teaching Program. A similar proposal was rejected by the legislature last year. Five percent of a district's teachers would be eligible to receive $2,000 awards for exemplary teaching. Participation by local school districts would be optional. Local school boards would determine the criteria to be used in making awards and obtain approval from the Department of Education. Criteria would stress excellence in classroom performance, leadership in support of new teachers, continued professional growth, and scholarly activities in subject areas.

Rhode Island

Although there are no current plans to develop state-level incentive pay plans for teachers, the Burrillville School District has developed a four-step plan with the assistance of a U.S. Department of Education grant. The district will make the plan available to other districts interested in using it.

South Carolina

The State Board of Education has approved three Teacher Incentive Program models for pilot-testing in nine districts during the 1985-86 school year, funded at $2.2 million. The incentive programs were called for in the 1984 Education Improvement Act. During 1984-85, 11 district proposals were funded for development of plans. From those plans, three composite models were developed by the State Department of Education.

The first is a bonus model in which teachers qualify by obtaining 100 points through a three-component plan: self-improvement (graduate study, staff development, professional activities); extended service (supervise student teachers, serve on committees, develop curriculum); and student achievement (which accounts for 50 to 60 of the points). A teacher portfolio of student achievement measures will be used to document student growth. In addition, teachers must not miss more than 5 workdays (of a 190-day contract year) and must meet a predetermined score on a teacher evaluation. The evaluation is to be conducted with a district instrument. The money is to be prorated on the basis of districtwide winners. The State Department notes that the program should identify 20 percent of the teachers, and a stipend range of $2,000 to $3,000 is strongly recommended. Districts are to supplement monetary awards with recognition programs for teachers. The State Department of Education is providing technical assistance teams to work with districts in assembling and analyzing student achievement data.

A second plan, a career ladder model, uses similar criteria as the bonus plan for qualification, but provides for three career levels, with supplements ranging from $1,000 to $3,000. Teachers are allowed to waive the experience requirements during the pilot year so that they can move into the upper levels.

A third plan is the campus/individual model. Two-thirds of the incentive money is to be paid to teachers qualifying under the individual plan, the other third is for the school plan. Under the individual plan, teachers qualify on criteria similar to those of the other plans. Awards under this program will not be less than $2,000. The campus plan rewards staff members (all certificate holders with the exception of administrators) in schools that show the greatest gain in student achievement. Schools that meet or exceed projected student achievement, as measured by a regression formula, will be merit schools.

All teacher incentive programs will be evaluated by teams from within and outside the district. A statewide plan for evaluation is then to be initiated during the 1986-87 school year.

Also under development is a Principal Incentive Pay Program. Criteria will be identified this year; proposals will be developed by districts. Pilot programs will be established in 1986-87, with statewide implementation in 1987-88.

South Dakota

The 1985 legislature enacted a career ladder for teachers and administrators, but implementation of the plan has been held up by a petition drive to refer the education law to a vote of the people in November 1986. Opposition is unrelated to the career ladder portion of the law—it is related to the "family-option" plan which would allow students from small schools to transfer to adjacent larger schools. However, the entire education bill was swept up in the petition and all funding is frozen until after the election.

The legislation would provide for a three-level career ladder certification system for teachers and administrators. At the first level, associate instructors or administrators would be evaluated by a committee of three—representatives of the school district, the state-level division of elementary and secondary education, and the educational institution from which the associate graduated. State funding would be provided for the evaluation process at this level. The third level, senior teacher or administrator (attainable after four years of experience), would recognize significant professional accomplishment or achievement. In making determinations, the State Board of Education would consider local evaluations, additional training, and supervision of other teachers.

The legislation states that promotion from one step to another should be accompanied by a significant pay increase; the amount would be left up to local school boards and no state funding would be provided. However, once the evaluation process is in place, the intent is to ask the legislature to provide funding the following year for the incentives for senior status. Under the legislation, the State Board of Education would promulgate rules for the new certification system. The rules have already been drafted. However, any rule that has its authority in the legislation is "on hold."

Tennessee

In the first year of implementation of the Tennessee Career Ladder Program, 39,800 teachers and administrators—about 92 percent of those eligible by virtue of having at least three years of experience—have voluntarily entered the new certification program. The state evaluated 3,120 candidates for the upper career levels. The State Board of Education recently announced that 458 teachers have attained Career Level II status; 632 attained Career Level III. With those certificates come state-paid incentive supplements ranging from $2,000 to $7,000 and additional professional opportunities including extended contracts and new responsibilities. In addition, 148 administrators attained career level certification at the upper levels.

Evaluations of some candidates are still in process and additional announcements are anticipated later in the summer. Not all of the teachers and administrators who applied for full sate evaluation at the upper career levels were evaluated this year; they will be evaluated next year and, if they meet the requirements, they will receive their supplements retroactively.

Applicants for the upper career levels were evaluated this year by teams of peers, who were full-time evaluators on leave from their local school systems. The 115 evaluators received a month's training and were paid by the state. Teacher evaluators observed classrooms, rated portfolios, and administered questionnaires to peers, students, and principals. Administrator evaluators interviewed candidates, rated portfolios, conducted observations, and administered questionnaires to peers, professional staff, supervisors, and students. A test of reading and writing was used for screening purposes and a professional skills test was used as one source of data. Each of the instruments was field-tested before being used for evaluation. All candidates who met the standards established by the State Board of Education attained career level status.

At the lower levels of the ladder local school districts conduct evaluations of teachers and administrators. They may use their own plans that meet state guidelines, or they may use a state model for local evaluation.

In the coming year, the State Department of Education and the State Certification Commission will refine the current evaluation system; develop, field test, and implement comparable systems for special and vocational educators, librarians, counselors, school psychologists, school social workers, attendance workers, audiologists, and speech and language specialists/pathologists; and develop additional modules for the Career Development Program for teachers and administrators.

Career Level III teachers and Caree, Level II administrators will serve on the new Regional and State Certification Commissions, and may apply to become evaluators next year. Funding for the program will increase from $62 million in FY 85 to $85 million in FY 86 and $122 million in FY 87 to accommodate increased numbers of educators moving into career level status.

Texas

Legislation was introduced during the 1985 session to make minor changes in the career ladder program established by the 1984 legislature, but was defeated. Implementation of the plan began during the past year; currently employed teachers were placed either on Level I or Level II of the career ladder. Decisions were made at the district level based on a performance appraisal (locally developed), experience, and additonal staff development or college credits accrued. The teachers were awarded supplements of $1,500 to $2,000 for Career Level II. If funds are insufficient to permit $2,000 supplements for the number of teachers who qualify, the law allows districts to reduce the supplement to $1,500 or to apply stricter performance criteria or both.

The legislation provided funding for educational improvement and support of the career ladder at the rate of $100 per average daily attendance for 1984-85; $120 for 1985-86; and $140 for 1986-87. Districts were required to spend $30 of the $100 in 1984-85 for salary supplements; this will go to $50 in 1986-87.

A performance appraisal instrument to be used statewide is currently under development. It will be piloted in the fall, along with training of observers. More than 20,000 surveys have been distributed to teachers across the state in an attempt to establish job-related behaviors.

Utah

Legislation in 1984 provided $15.2 million for career ladders to be implemented by local districts in 1984-85. Despite the short time frame, all 40 local districts and 6 special local education agencies chose to participate. State funds went directly to the districts, which could allocate up to 50 percent of the funds for an extended contract year, with the remainder going for career ladder advancement.

Analyses of local plans undertaken by the University of Utah and the State Office of Education indicate that during the first year most districts did allocate the full 50 percent to extend contracts by several days to allow for planning, in-service, and parent conferences. In addition, the career ladder advancement provisions encouraged districts to revise their evaluation practices. Most now use evaluation committees that include peers and rely on multiple lines of evidence, including student achievement. Teachers who have been promoted on the career ladder are serving as teacher leaders to help new teachers, and are redesigning curriculum.

The 1985 legislation doubled the career ladder funding to $30.5 million ($36 million including fringe benefits)—roughly $2,000 per teacher. The legislature specified that no less than 10 percent of the district allocation must be spent for performance bonuses to teachers. This is expected to stimulate further improvement and refinement of local evaluation procedures. The Office of Education is providing considerable technical assistance to districts. The new legislation also allows districts to use a portion of the career ladder funds as an added incentive to extend contracts for teachers in fields with shortages. The legislature resisted efforts to have the funds allocated to the regular weighted pupil unit program in lieu of the career ladder program. If the program is successful, the legislature may consider increasing funding to $54 million next year.

Vermont

A statewide task force, which includes representatives of higher education, teachers' associations, school boards, superintendents, and the Vermont Department of Education, has been working to devise a Career Development Model for Vermont's teachers and administrators. Under consideration is a model that would provide for differing responsibilities and compensation. Plans are in the formative stages.

The State Board of Education will also be considering issues related to career incentives in the fall. In addition, four local school districts have been developing incentive plans.

Virginia

In 1982, the General Assembly requested that the Board of Education determine whether paying teachers for outstanding work was feasible. An advisory committee was established by the governor in 1983 to make recommendations. Two programs, a master teacher plan and a pay-for-performance plan, were funded for piloting in the 1984-86 biennium. The State Board of Education provided guidelines for the projects. Six districts were funded at up to $50,000 each for two-year piloting of pay-for-performance plans. In these plans, teachers receive bonuses based on performance within the school district. Three master teacher programs were funded for a one-year pilot project. The master teacher or career ladder plans provide levels for advancement of teachers based on evaluations of teaching performance.

The State Board of Education is providing for evaluation of the effectiveness of the programs by contracting with an outside agency. The programs will be evaluated against the Board's criteria, which include the involvement of teachers in the planning and the evaluation processes used. The State Board of Education recently endorsed the concept of incentive programs for teachers and will make recommendations to the governor to increase the budget for the programs during 1986-88.

Washington

The legislature approved a Beginning Teachers Assistance Pilot Program which will provide 100 mentor teachers to assist beginning teachers in 1985-86 and up to 1,000 mentors in the second year of the program. A mentor teacher will be one "selected as a superior teacher based on his or her evaluation." The program provides for support to beginning teachers, stipends to mentor teachers, training of mentor teachers, and use of substitutes for both mentor and beginning teachers to give them opportunities to work together. Total funding for the two years is $1.5 million. The Superintendent of Public Instruction will report to the legislature in January 1988 on the results of the program. In addition, the legislature passed a bill providing $500,000 for two years for the state to set standards and to develop, field-test, and pilot models for teacher evaluation. The models could then be used by local school districts.

In 1984 the Temporary Committee on Educational Policies, Structure, and Management, and the Washington Roundtable both called for the development of career ladders for teachers. The Senate considered a statewide plan, but then adopted a scaled-down plan calling for $1 million for 10 local pilot projects. Local school districts would have submitted proposals for career ladder plans after they were approved by local school boards and employee organizations. The bill died in a House committee, however. Some proponents see the Beginning Teacher Assistance Pilot Program as a step in the direction of career ladders.

West Virginia

The State Board of Education established an Advisory Committee on Evaluation and Incentive Programs in 1984. The committee recommended that evaluation systems be developed by local districts, with the design of incentive programs to follow. The State Board of Education issued policies in 1985 regarding the development of the local evaluation plans. The purposes of the evaluation plans are to improve the quality of education, to provide employees with information on performance, to furnish information for personnel decisions, and to determine which employees would be eligible for future incentive systems. All local plans will be reviewed by the State Department of Education and will go into effect during the 1985-86 school year. Evaluations will be conducted by the employees' supervisors and will be based on at least two observations. Performance standards for teachers will be based on knowledge of subject matter, classroom management, instructional skills, monitoring of student progress, professional growth, pupil-teacher-parent relationships, and professional work habits.

The State Board of Education policy and guidelines for district incentive programs will be established by July of 1986; development of local plans and implementation will follow.

Wisconsin

A 1984 Task Force on Teaching recommended that a career ladder and statewide system of merit pay based on teacher performance be established. The Wisconsin Teaching Incentives Project was awarded a planning grant by the U.S. Department of Education. During 1984-85, the State Department of Education issued guidelines and possible standards that could be used in the development of local district proposals for a pilot project. Seventeen districts submitted proposals; eight were chosen as piloting sites. Legislative approval of funding of $900,000 for two years is pending. The proposals were cooperatively designed by teachers, school board officials, and community members.

Wyoming

While there has been no formal proposal for performance-based compensation, the 1984 report of the Wyoming Blue Ribbon Committee on Education called for development of "verifiable criteria for determining competencies" of teachers; a minority report called for consideration of merit in teacher compensation. At least one local district is studying the feasibility of a career ladder program.

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